

MISSION

To fulfill the principles of *The Bond* by providing our members a lifetime experience that allows each member to reach their own personal greatness

VALUES

Friendship, Sound Learning, and Rectitude

VISION

To be recognized as the premier fraternal leadership development society in North America





STRATEGIC INITIATIVE

GROWTH AND RETENTION

Execute strategies that prioritize the growth and retention of existing chapters and the expansion of new chapters.

GOALS

1.1 Growth: Expand the Fraternity's reach by increasing market share on existing campuses and pursuing expansion opportunities at new campuses, resulting in 250 chapters and 17,500 undergraduate members.

1.2 Retention: Improve the Fraternity's new member and chapter retention rates, resulting in an 85 percent new member retention rate and a chapter retention rate of 98 percent.

1.3 Culture: Create a culture of recruitment and retention that leads to diverse chapters filled with high-performing and purpose-driven members.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

1.1 GROWTH

1.1.1 Execute an expansion strategy that culminates in 100-chapter installations, with fifty of those chapters being at campuses new to Phi Delta Theta by 2030.

1.1.2 Explore marketing and expansion strategies that include the targeting of non-four-year, degree bearing institutions in addition to community colleges, transfer students feeding into campuses where Phi Delta Theta has a chapter by 2023.

1.1.3 Provide recruitment education and support that results in 80 percent of chapters maintaining a chapter size higher than their campus average by 2030.

1.2 RETENTION

1.2.1 Leading up to plan's launch, develop an updated brand position to align with local operations, enabling chapters and colonies to clearly articulate membership benefits and expectations.

1.2.2 Implement an annual chapter assessment and accreditation program that compliments chapter dashboards, identifies support needs and brings accountability to failing chapter operations by 2021.

1.2.3 Based on chapter performance data, identify, engage, and intervene with chapters that have high risk of suspended operations by 2021.

1.2.4 Create ideal membership criteria for chapters to use when evaluating potential new members that is integrated into customer relationship management solution by 2022.

1.2.5 Introduce a program that creates micro-support structures within the chapter and facilitates meaningful relationship building by 2023.



1.3 CULTURE

1.3.1 Continue biennial demographic surveys to understand the makeup of our undergraduate membership to ensure membership at each chapter is reflective of campus dynamics in addition to offering focused programming to highlight the benefits of a diverse membership.

1.3.2 Obtain 100 percent completion rate of PDT U recruitment chairmen certifications by 2020.

1.3.3 Introduce recruitment track at the Kleberg Emerging Leaders Institute to complement the Phikeia Educators College by 2022.

1.3.4 Ensure that 100 percent of recruitment chairmen are annually attending province retreats by 2022.

1.3.5 Place and educate recruitment advisors at 100 percent of chapters and colonies by 2024.



MEMBER DEVELOPMENT

STRATEGIC INITIATIVE

MEMBER DEVELOPMENT

Execute and promote transformational education that focuses on self-awareness, affirmation, motivation, and innovative leadership skills through on-demand technology and in-person program support for continued lifelong skill development and growth.

GOALS

- 2.1 Personal Growth:** Provide a values-based membership experience that promotes leadership competencies and personal excellence.
- 2.2 Professional Readiness and Development:** Offer an environment that enables a strategic advantage and the connections needed to achieve professional success.
- 2.3 Fulfillment in Life:** Provide the opportunity that all members can further develop and educate themselves through experiential and personal learning.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

2.1 PERSONAL GROWTH

- 2.1.1** Reach a total of 60,000 members educated via conference programs, with the average being 8,500 members by 2030.
- 2.1.2** By start of plan, work to ensure live stream capability is in place for all in-person conferences for remote user engagement.
- 2.1.3** Infuse standardized, more efficient and effective new member education into member development program by 2021.
- 2.1.4** Develop, maintain and compile existing chapter and member educational resources into a dynamic online library by 2022.
- 2.1.5** Seek a third-party certification for member development program by 2023.

- 2.1.6** For 2023, and all previous years, achieve on average 600 members (5 percent of membership) each academic year that have completed certification for the four-year membership development program and review scalability and program enhancement for full implementation to occur no later than 2030.

2.2 PROFESSIONAL READINESS AND DEVELOPMENT

- 2.2.1** Measure six-month post-graduation job or education placement of recent alumni members by 2022 with the goal of obtaining a 90 percent placement rate by 2030, build further strategy to improve success.
 - 2.2.2** Provide a tool to connect collegiate members and alumni/engaged partners for internships and co-ops by 2023.
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MEMBER DEVELOPMENT

2.2.3 Utilize assessment tool that provides members with greater self-awareness and personal development to continuously improve by 2023.

2.2.4 Arrange a mentorship platform that connects and routinely engages 25 percent of members with alumni mentors by 2023.

2.2.5 Assess and determine high-impact opportunities for career development education while maintaining single sex tax status by 2023.

2.3 FULFILLMENT IN LIFE

2.3.1 Provide incentive or certification for chapter and individual educational opportunities that promote cultural competencies such as inclusion and equity by 2021.

2.3.2 Offer educational tools (proper financial management and planning) that prepare for post-graduation life by 2023.

2.3.3 Develop skills to assess mental and physical health and plan to enhance mental wellness by 2023.

2.3.4 Develop skills to relate and connect to others in a safe, productive and satisfying manner by 2023.



HEALTH & SAFETY

STRATEGIC INITIATIVE

HEALTH AND SAFETY

Instill a culture of group and individual health and well-being that is recognized and proven to be the safest fraternal organization in North America.

GOALS

3.1 Compliance: Create a culture of risk prevention that results in industry-leading compliance rates.

3.2 Housing and Insurance: Promote the overall importance of safety assurance through state-of-the-art facilities with professionally trained and equipped local advisors.

3.3 Mental Health and Outreach: Develop the capacity to provide outreach and awareness for men seeking assistance and continued support.

3.4 Safety Recognition: Be publicly recognized as an organization focused on the health and safety of its members and host institutions.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

3.1 COMPLIANCE

3.1.1 Utilize chapter performance metrics from accreditation and assessment to ensure that each chapter submits six event planning forms annually and is in compliance with the requirements of the Phikeia Program by 2021.

3.1.2 Review and consult chapter bylaws to promote individual accountability by 2021.

3.1.3 Provide 100 percent of membership bystander education yearly offering a menu of health and safety-focused programming through in-person and online education.

3.1.4 Decrease the frequency of liability claims by 75 percent and severity by 50 percent by 2030.

3.2 HOUSING AND INSURANCE

3.2.1 Through the completion of *Phi Delt 2030*, ensure our members are at their safest, the by-product will be the lowest fraternity insurance premium in the industry each year.

3.2.2 Mandate all Housing Corporation properties are equipped with fire suppression systems and leak detection technology via a comprehensive multi-year phase-in program with potential incentives by 2022.

3.2.3 Establish grant program to retrofit current social space into space that is conducive for education and leadership development by 2024.



HEALTH & SAFETY

3.2.4 Placement of a trained and certified live-in adviser in 100 percent of all eligible House Corporation owned properties by 2030.

3.2.5 Promote sustainable habits to align with constituent desires for eco-friendly housing practices to achieve 75 percent of Green Star Certification in all house corporation-owned properties by 2030.

3.2.6 Decrease the frequency of property claims by 50 percent and severity by 75 percent by 2030.

3.2.7 Expand Communication Services efforts to expand client base via feasibility studies, alumni communications, and capital campaigns by 25 percent by 2030.

3.3 MENTAL HEALTH AND OUTREACH

3.3.1 Provide a prevention experience that utilizes resources and on-demand technology for all members and promotes positive mental health and wellness by 2021.

3.3.2 Connect members to national, state, and campus mental health resources by 2021.

3.3.3 Provide a men's health and wellness resource directly to high school counselors focused on transition from high school to college through a designated partnership by 2023.

3.4 SAFETY RECOGNITION

3.4.1 Obtain recognition by chapter host institutions as a fraternal leader within the realm of health and safety by 2030.

3.4.2 Receive accreditation and recognition of our health and safety programs by an appropriate entity such as the American College Health Association by 2030.



ENGAGEMENT

STRATEGIC INITIATIVE

ENGAGEMENT

Increase the frequency, quality, and breadth of communication tactics and programming to increase engagement opportunities with the Fraternity.

GOALS

4.1 Strategic Content Creation: Create and obtain world-class content that targets key audiences, is delivered through leading communication channels, and empowers advocates to champion Phi Delta Theta.

4.2 Parents: Create an environment that encourages parents to be well-informed and active participants in the success of Phi Delta Theta.

4.3 Alumni: Encourage alumni to connect with each other and learn about how they can support member development programming and other strategic initiatives of Phi Delta Theta.

4.4 Fraternity and Sorority Life: Create enhanced relationships that encourage collaboration and support through all levels of university administration in order to improve the greater Greek community.

4.5 Media: Be recognized by media outlets throughout North America as a leader within the fraternal movement through proactive outreach and relationship building.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

4.1 STRATEGIC CONTENT CREATION

4.1.1 Prior to the launch of this plan, design and implement an updated brand position that enables the Fraternity to clearly articulate benefits to members and non-members alike.

4.1.2 Utilize new brand position to re-design and build website, apps, blog/vlog, social media, and podcast platforms by 2021.

4.1.3 Build dynamic content calendar, identify and assign organization-wide content creators, and determine audiences and platforms by 2021.

4.1.4 Translate developed content into opportunities that add value to the membership development program by 2021.

4.2 PARENTS

4.2.1 Find committed Phi Delt parents and introduce an International Parents Council to help us understand parent perspectives and needs by 2021.

4.2.2 Develop a focused collection of content to educate the parents of our members and potential new members about the Fraternity and the opportunities to be involved by 2021.



ENGAGEMENT

4.2.3 Build parent advocacy by challenging the Parent Council and members of the Parents Clubs to develop strategic content by 2021.

4.2.4 Understand structures of current Parents Clubs and create resources that facilitate the development of Parents Clubs at 75 percent of our chapters and colonies by 2030.

4.2.5 Empower parents to serve on Chapter Advisory Boards and House Corporations so that they make up 20 percent of the Fraternity's chapter-level volunteer corps by 2030.

4.3 ALUMNI

4.3.1 Utilize Province Retreats to host alumni networking events by 2021.

4.3.2 Build feature in the Phi Delt Network app that pushes ongoing content to drive user acquisition and engagement by 2021.

4.3.3 Create a young alumni engagement committee that works to build initiatives and momentum through recognition, giving, service, social, and networking by 2021.

4.3.4 Identify top twenty Phi Delt markets based on density and encourage clubs or motivated individuals to host regular gatherings at a consistent, sponsored location by 2022.

4.4 FRATERNITY/SORORITY LIFE

4.4.1 Create campus-based advisory council that helps guide the Fraternity in its strategies and proactively build great partnerships with our host institutions by 2021.

4.4.2 Ensure conference faculty is made up of 20 percent non-Phi Delt university partners by 2021.

4.4.3 Communicate chapter performance data through a chapter dashboard quarterly and provide opportunities for campus-based professionals to validate data and provide additional feedback by 2021.

4.4.4 Build and maintain meaningful university administration relationships at sixty campuses where Phi Delta Theta does not exist, ongoing.

4.4.5 Develop recognition program for campus-based professionals by 2024.

4.5 MEDIA

4.5.1 Create and maintain database of media outlets and journalists who report on Greek life and Phi Delta Theta by 2021.

4.5.2 Develop proactive media engagement plan in order to build relationships with a prioritized list of media outlets and journalists by 2021.

4.5.3 Build marketing and distribution plan to deliver positive Phi Delta Theta and LiveLikeLou content to local and national media outlets by 2021.

4.5.4 Understand quantity, reach, and sentiment of current media coverage and improve positive news by 50 percent by 2025.



SUPPORT

STRATEGIC INITIATIVE

SUPPORT

Create the optimal infrastructure, volunteer, and staff support model that prioritizes servant leadership and enables all chapters and members to reach their full potential and further the strategic initiatives of the Fraternity.

GOALS

5.1 Volunteer Mobilization: Actively recruit, manage, retain, and evaluate highly-trained volunteer corps to best support chapters and members.

5.2 Internal Talent: Adjust structure and enhance culture to ensure optimal performance and the acquisition, development, and retention of a committed and talented GHQ staff.

5.3 Technology and Data: Feature a cutting edge, single-source, user-centered platform and solution that facilitates good contact information and best serves the needs of staff, volunteers, and members.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

5.1 VOLUNTEER MOBILIZATION

5.1.1 Determine succession planning process and structure for province presidents by 2021.

5.1.2 Develop key performance indicators and corresponding tactics that positions the Province President Program to drive chapter and CAB success and supports the strategic initiatives of the Fraternity by 2021.

5.1.3 Beginning in 2020, provide quarterly educational touchpoints for House Corporation members and execute bi-annual House Corporation Summits.

5.1.4 Provide quarterly educational touchpoints for CAB members by 2022.

5.1.5 Develop and implement a certification and evaluation program that results in five certified House Corporation members where such management model exists by 2030.

5.1.6 Recruit and maintain a minimum of five certified CAB members at each colony/chapter at all times, with the goal of having 1,250 certified CAB members by 2030.

5.1.7 Utilize annual assessment to measure support (internal and external) and effectiveness of CABs, and use data to prioritize CAB development in order to achieve an average effectiveness score of 4.5 out of 5.0 by 2030.



SUPPORT

5.2 INTERNAL TALENT

5.2.1 Establish organizational structure required to execute *Phi Delt 2030* prior to plan's launch and review capacity, opportunities, and high performers in conjunction with plan annually.

5.2.2 Develop a high-functioning, strategy-driven chapter support model that intentionally focuses on hiring, location, and outcomes for chapter and volunteer success by 2021.

5.2.3 Document tasks for each General Headquarters position for succession purposes and review it annually by 2021.

5.2.4 Review and seek 360 degree feedback about human resource practices on an annual basis to build a GHQ staff culture and structure that recruits great people, recognizes their successes, and retains top performers at all levels by 2022.

5.2.5 Review and create alternative solution to current human resource practices and delegation of duties with a focus on best serving the employee and compliance by 2022.

5.2.6 Institute annual benchmarking and feedback process to ensure competitive employee offerings including, but not limited to, work arrangement, compensation, benefits, structure, and professional development by 2022.

5.2.7 Seek third-party endorsement as industry and/or regional employer by 2025.

5.3 TECHNOLOGY AND DATA

5.3.1 Engage an independent technology evaluation firm that will provide a streamlined, forward-focused enterprise planning enterprise solution that includes a customer relationship management system for implementation by 2021.

5.3.2 Acquire more member email addresses (47 percent to 63 percent), physical addresses (78 percent to 85 percent) and mobile numbers (27 percent to 50 percent); increase unique parent records (48 percent to 90 percent) by 2030.



FUNDING

STRATEGIC INITIATIVE

FUNDING

Implement strategies that enable Phi Delta Theta Fraternity, Phi Delta Theta Foundation, and LiveLikeLou Foundation to successfully fulfill their mission.

GOALS

6.1 Major Giving: Through future capital campaign planning, continue major gift initiative to grow the Foundation-managed assets to \$50 million through newly documented major gifts, realized investment revenues, and realized planned gift dollars. The campaign will work to support growth and participation of the Leadership and Ethics Academy, LiveLikeLou, along with other qualifiable expenses.

6.2 Planned Giving: Through future capital campaign, promote and grow the Living Bond Society membership by increasing documented planned and deferred gift participation to \$12 million.

6.3 Annual Giving: Enhance annual fund program to build lifelong donors while providing a funding stream that supports Foundation operations and underfunded programming by raising \$1.5 million in unrestricted and temporarily restricted funds.

6.4 LiveLikeLou: Build a sustainable infrastructure and the momentum to meaningfully engage Fraternity members in the ALS cause, raise more than \$13 million to support ALS patients and their families and research to find a treatment or a cure, and measurably leave ALS better than we found it by 2030.

6.5 Alternative Revenue: Strengthen membership value proposition, housing stock, and organizational capacity by generating \$400k a year through affinity, royalty, grants, and other alternative activities.

6.6 Financial Solutions: Enhance the enterprise functionality/operations, security, and investment practices of the Fraternity and related entity funds.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

6.1 MAJOR GIVING

6.1.1 Create strategy and tactics to properly leverage and steward remaining Shaffer Fund prior to launch of 2030 Campaign.

6.1.2 Develop a targeted approach through prospect research that will drive major gift operations and priorities prior to launch of 2030 Campaign.

6.1.3 Ensure that organizational structure and staff development, training, and retention support campaign success prior to launch of 2030 Campaign.

6.1.4 Create case statement and launch campaign in June 2020.



FUNDING

6.2 PLANNED GIVING

6.2.1 Promote Living Bond Society through advancement communications; making stewardship and actively managing potential Living Bond Society prospects a substantial component of 2030 campaign.

6.3 ANNUAL GIVING

6.3.1 Increase Sword and Shield Society membership at all levels by an average of 3 percent annually.

6.3.2 Sustain the Phi Delt Fund until 2020 at \$1 million then increase the fund to \$1.5 million annually by 2030 through an average 4.3 percent growth rate.

6.3.3 Grow dollars raised at all trustee roundtable levels by at least 3.25 percent annually each year.

6.3.4 Create strategies through campaign planning to acquire new donors through unique engagement and giving opportunities prior to launch of 2030 Campaign.

6.3.5 Combat donor attrition through the creation of a sustained giving society that stewards current members and cultivates new members prior to launch of 2030 Campaign.

6.3.6 Expand the current Knights of Pallas undergraduate giving program to include increased focus on education and capturing philanthropic interests prior to launch of 2030 Campaign.

6.3.7 Increase young alumni giving by converting 15 percent of Knights of Pallas donors into Foundation donors and marketing of young alumni Trustees Roundtable starting in 2021.

6.4 LIVELIKELOU

6.4.1 By 2030, raise more than \$13 million through engagement of 80 percent of chapters and alumni clubs via personal efforts (Iron Phi), team events, and community appeals; expand the menu of creative giving options (e.g., planned giving and non-Phi appeals such that 25 percent of annual funds raised come from private foundations, corporations, memorial giving, etc.)

6.4.2 By 2030, build a sustainable infrastructure of talented people, cutting-edge technology, and an annual operating fund which can provide \$50,000 to empower consistent fundraising success and engage Fraternity members in the ALS cause and the purpose of LiveLikeLou.

6.4.3 By 2030, support ALS patients and their families through a \$4 million fund that grants forty Iron Horse Scholarships/year; build national partnerships and make annual gifts to support younger dependents of ALS families; and engage 50 percent of the Fraternity's undergraduate chapters in annual volunteerism for ALS families.

6.4.4 By 2030, support ALS research for a treatment or a cure through a \$8 million fund that pays out \$400,000/year in grants and national partnerships with promising scientists, research institutions, and other life science companies.



FUNDING

6.5 ALTERNATIVE REVENUE

6.5.1 Review current affinity and licensing relationships to maximize current use of brand, access of quality merchandise and services to members while increasing current level of financial support by 2021.

6.5.2 Launch True Blue Society review to maximize program potential for alumni engagement, Foundation support, and organizational value by 2022.

6.5.3 Create committee to discover and build relationships with entities that provide grants including, but not limited to, the areas of health and safety and regional enrichment that could underwrite the Fraternity's efforts to make a societal impact by 2024.

6.6 FINANCIAL SOLUTIONS

6.6.1 Analyze all potential eligible funding requirements to inform campaign development strategy, goals, and execution timeline prior to launch of new campaign.

6.6.2 Review Phi Delta Theta, Inc. and affiliated organizations' asset management practices by 2022.

6.6.3 In an effort to establish a national housing corporation, increase housing designated assets to \$25 million to have adequate funding and/or third-party investor ready to assist distressed properties to retain and enhance real estate assets by 2025.



PHI DELTA 2030
Strategic Vision of the International Fraternity